



## Understanding the Case Portal

The new case portal will allow cases to enter contacts on their phone or computer directly from the digital notification they receive. Read on to understand how this may impact your work.

### WHAT CASE PATIENTS SEE: Case Notification and Portal

All cases who test positive for COVID-19 and flow into CCTO from NC COVID will be sent an automatic text and/or email notification attempting to inform them of their positive result via a link to a landing page. **This link will now be unique to the case patient and allow them to provide a symptom onset date, to calculate personal isolation dates, and to enter contacts. See below for the case patient's perspective.**

1. Case patient receives a text or email directing them to click a link with information about their COVID-19 test result. This link is now unique to this case.
2. Case patient clicks the link and arrives at a unique landing page that lists the date of their positive test and invites them to **enter their symptom onset date** or to select that they have not had any symptoms. **The page automatically uses this information to generate a unique isolation end date for 10 days after the symptom onset date (or 10 days after the test date if no symptoms).**
3. Case patients who click "Next" will be given three next steps - to isolate from others, to notify their close contacts, and to get the COVID-19 vaccine.
4. Case patients who click "Next" will be asked to confirm their identity by entering their date of birth, which was collected at the time of their test. *If the case enters a DOB that does not match the one in the system, they will receive an error message at the top of the page and will not be permitted to proceed.*

1

Public Health Notification inbox x

NC Community Team <NC-Outreach-noreply@dhhs.nc.gov>  
to me

Hello, this is the COVID Community Team.

The community team focuses on reaching out to people who may have COVID-19 or to anyone who support to protect themselves and their loved ones.

We have an important message about your recent COVID-19 test. Please click on the following link: <https://dhhs-covid19-ccto-uat-po.powerappsportals.us/en-US/case/?id=3dceb881-8dda-eb11-bacc-001dd804ac1f>.

For an immediate response, you can call 844-628-7223.

Link to Case Portal

2

NCDHHS

Help slow the spread of COVID-19!

You have received a message from the NC COVID Community Team because you recently tested positive for COVID-19. The NC COVID Community Team is here to help you get the resources, information, and support you need to protect yourself and your family.

Our records show you tested positive for COVID-19 on:

7/1/2021

Since you tested positive, you should isolate yourself from others to protect yourself and your loved ones. Isolation means that you should stay home and avoid sharing a bedroom, bathroom, or common spaces with anyone else in your household. You should isolate until the date provided to you below has passed **AND** 24 hours have passed since you have had a fever **AND** your symptoms have improved. For more information on how to properly isolate, please refer to [this CDC webpage](#).

Please enter the date your **COVID-19 symptoms started** to calculate your isolation end date:

My COVID-19 symptoms began on (MM/DD/YYYY):

6/30/2021

☐ I have not had any COVID-19 symptoms.

Based on your testing date and the information you have provided, you should isolate through at least **07/10/2021**.

Landing Page

3

NCDHHS

Next Steps:

- **Isolate from Others:** Protect your friends and loved ones. For more information about safely isolating, please refer to the previous page by clicking the back button.
- **Notify your Close Contacts:** Your close contacts are people who you spent more than 15min with and closer than 6ft. Click NEXT to help protect your close contacts and stop the spread of COVID-19.
- **Get your Vaccine:** COVID-19 vaccines are helping us safely get back to the people and places we love. Once you have recovered from COVID-19 and can no longer spread the virus, find your spot and get your shot. For more information about getting your vaccine, visit [YourSpotYourShot.nc.gov](https://www.nc.gov/your-shot)

Next Steps

4

NCDHHS

Please Enter Your Date of Birth

Thank you for helping us confidentially notify your close contacts. This is an important step in the process of COVID-19. Before you share your contacts, we want to reconfirm that it's you! Please confirm the date of birth you provided when you were tested for COVID-19:

Confirm DOB - MM/DD/YYYY

6/10/1997

**Incorrect Date of Birth -** The date of birth that you have provided does not match the date of birth we have on record for your COVID-19 test. This may mean that you have received this message in error or that the date of birth we have on file is incorrect. Please call the NC COVID Community Team at 844-628-7223 from 7am to 7pm to speak to someone about getting this error corrected. Fecha de nacimiento incorrecta - La fecha de nacimiento que usted ingresó no concuerda con la fecha de nacimiento suministrada con su prueba de COVID-19. Usted puede haber recibido este mensaje por error o la fecha de nacimiento que obra en el expediente puede estar incorrecta. Por favor llame al equipo de la comunidad NC COVID al 844-628-7223 entre las 7:00 AM y 7:00 PM para comunicarse con un miembro del equipo y corregir este error.

Confirm Identity

Error message when an incorrect DOB is entered.



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## WHAT CASES SEE: Case Notification and Portal (cont'd.)

5. Case patients who click "Next" will be taken to a page that provides them with a definition of a "close contact" and a calculated date for the start of their contagious period, which is calculated as 48 hours prior to their test date or symptom onset date (whichever is earlier). It also prompts them to submit information about their close contacts so that contacts can be notified of their exposure.
6. Clicking "Add Close Contact" provides the case with a form to complete the contact's first and last name, the last date of exposure, a phone number, email, and any additional information the case patient would like to provide via a free text box. **First name, last name, last date of exposure, and email OR phone are required.**
7. Clicking "Submit" will lock this contact and will automatically submit them into CCTO, and this process to submit a contact can be repeated as many times as needed. *See page 5 for details on locating this information when it arrives in CCTO.*
8. Clicking "Next" a final time after adding contacts provides a closing page with information about SlowCOVIDNC, resources for support, and information for contacting the local health department if needed. At this point, the case may close the page. *The case portal may be re-accessed at any point using the received link.*

5

Close Contact  
Explanation

6

Adding Close  
Contacts' Info

7

Submitting Close  
Contacts

**Note:** The system will permit any Last Date of Exposure regardless of whether it falls outside the close contact range. If the LDOE is a future date or more than 6 days before the case's diagnosis date, this contact will be submitted into CCTO but will not automatically become a contact profile. See page 5 for details.

8

Closing Page



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## FOR ALL CCTO USERS: Locating Info From the Case Portal Within CCTO

Information provided by cases through the case portal will update directly within CCTO (**NOT NC COVID**), and you can use this data to inform your contact tracing or case investigation work:

**NOTE:** As a result of the information required for case patients to utilize the case portal properly, **Date of Birth** and **NC COVID Diagnosis Date** (which will lock immediately upon completion) are now required fields for all cases within CCTO. *If you add an incorrect NC COVID Diagnosis Date, turn the notification toggle off and request support via your admin or ServiceNow.*

1. When a case patient enters information within the case portal, their CCTO profile (which has already flowed in automatically from NC COVID) will reflect a symptom onset date if one was provided. This will be displayed in the new, editable **Symptom Onset Date** field in **Monitoring Details** on their profile.
2. Contact submissions made by case patients will flow directly from the case portal into CCTO in a new location called **Case Portal Submissions**. All the contacts submitted here will **automatically** have a contact record created within the Contacts Tab as long as their last date of exposure is the current date or a past date that is no more than 6 days before the case's diagnosis date; therefore, generally, no action is required on this tab.\*
3. Within the Contacts Tab, each contact record that is created from the case's submissions will be assigned to the **county owner team of the case patient who entered them into the portal.**

**1**

**Tree Stump**  
Contact - MDA Form

CCTO Contact Assessments All Activities Recent Monitoring History Referrals System Information Related

| Record Information             |              | Monitoring Details       |           |
|--------------------------------|--------------|--------------------------|-----------|
| Contact or Case Patient        | Case-Patient | Begin Monitoring?        | ---       |
| C#                             | C-0000992790 | Monitoring Status        | ---       |
| Event #                        | 1            | Monitoring End Date      | ---       |
| Case-Patient NC-COVID Event ID | 101212121    | Final Monitoring Outcome | ---       |
|                                |              | Symptom Onset Date       | 6/30/2021 |

**2**

Home Recent Pinned Apps Dashboards Contacts Households Assessments Activities Referrals Case Portal Submissions Locations Events Tasks

All Case Portal Submissions

| Auto #       | Created On          | Status   | First Name           | Last Name            | County (Source Ca...) |
|--------------|---------------------|----------|----------------------|----------------------|-----------------------|
| E-0000001127 | 7/1/2021 1:14 PM    | Active   | Fig                  | Leaf                 | Dare                  |
| E-0000001126 | 7/1/2021 12:46 PM   | Active   | Jacquie              | Goeking              | Watauga               |
| E-0000001125 | 7/1/2021 12:25 PM   | Inactive | Test                 | Test68               | Forsyth               |
| E-0000001124 | 7/1/2021 12:23 PM   | Inactive | Test Contact (Cas... | Test Contact (Cas... | Swain                 |
| E-0000001123 | 7/1/2021 11:59 A... | Active   | Yyyy                 | Gggg                 | Alamance              |
| E-0000001122 | 7/1/2021 11:54 A... | Inactive | Kelly                | Ruggiero             | Burke                 |
| E-0000001121 | 7/1/2021 11:52 A... | Active   | D                    | Test                 | Wake                  |
| E-0000001120 | 7/1/2021 11:48 A... | Inactive | C                    | Test                 | Wake                  |
| E-0000001119 | 7/1/2021 11:46 A... | Active   | B                    | Test                 | Wake                  |
| E-0000001118 | 7/1/2021 11:38 A... | Inactive | Aubergine            | Solanaceae           | Buncombe              |
| E-0000001117 | 7/1/2021 11:35 A... | Inactive | Bubba                | Joe                  | Forsyth               |
| E-0000001116 | 7/1/2021 11:35 A... | Active   | Fgg                  | G                    | Alamance              |

**\*Note on contact submissions that are not automatically accepted:** If a case provides an LDOE for a submitted contact that is a future date or that is more than 6 days before the case's diagnosis date, a contact record will **not** be created automatically; however, the contact information will still be submitted in the portal and can be viewed in the Case Portal Submission Tab in CCTO. A CI should verify with the case whether this person is a true contact. See page 5 for details on how to identify these submissions and generate a contact record from them if needed.

**3**

**Tom Chilling**  
Contact - MDA Form

CCTO Contact Assessments All Activities Recent Monitoring History Referrals System Information Related

| Local Health District Information |                   | Record Information |                   |
|-----------------------------------|-------------------|--------------------|-------------------|
| County (Text)                     | Buncombe          | Modified On        | 4/20/2021 1:45 PM |
| Region                            | 2                 | Modified By        | covid_arias       |
| Local Health Department           | Buncombe          | Created On         | 4/20/2021 1:45 PM |
| State/Province                    | NC                | Created By         | covid_arias       |
|                                   |                   | Legacy Created By  | ---               |
| System First Outreach Date        | 4/20/2021 1:45 PM | Owner              | Buncombe          |



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## FOR ALL CCTO USERS: Locating Info From the Case Portal Within CCTO

4. The new **Created from Case Portal** field in the System Information page will be toggled to "Yes" for any contacts who have flowed into CCTO from the case portal. To display all contacts who originated from the case portal within the *Contacts Tab*, you can filter the **Created from Case Portal** column at the far right of the **All Monitoring Events** view.
5. Additionally, a new section for notes called **Notes Provided from Case Patient on Online Case Portal** will appear on the contact record of any contacts created through the case portal if the "Additional Information" field was completed by the case during contact submission.

**4**

System Information Related

6/27/2021 6:59 PM

SYSTEM

6/25/2021 4:30 PM

Jahnavi Parikh

Status

Status \* Active

Status Reason Active

Cloned No

Cloned Record GUID ---

Created From Case Portal Yes

**5**

Home Recent Pinned Apps Dashboards Contacts Households

All Monitoring Events Search this view

Test Location Test Results Date of Birth Most Recent Created From Case Portal

--- --- 1/1/1950 7/1/2021 ... No

--- --- 1/1/1981 7/1/2021 ... No

--- --- 7/1/2021 ... Yes

--- --- 7/1/2021 ... Yes

Monitoring Event Notes

Notes provided from Case Patient on Online Case Portal

testing

Last date you were in close contact with this person \*

6/2/2021

Phone Number

Email

testingforarias@gmail.com

Additional Info

testing

## FOR ADVANCED USERS AND CASE INVESTIGATORS:

For more information about reviewing case submissions, please see the next page.  
**You should only complete the manual approval process for these submissions if specifically instructed to do so.**



# Understanding the Case Portal

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## FOR CASE INVESTIGATORS: Locating Case Portal Contact Submissions

All information regarding any contacts submitted by the case patient is taken by the portal and stored within CCTO; **however, not all of these submissions automatically become contacts.** Specifically:

- All contacts submitted by the case whose last date of exposure is **1) today or a past date AND 2) no more than 6 days before the case's diagnosis date** **are automatically created** as contact profiles within CCTO.
- All contacts submitted by the case whose last date of exposure is **1) a future date OR 2) more than 6 days before the case's diagnosis date** **are not automatically created** as contact profiles in CCTO. If needed, you are able to review this submission and convert it into a new contact profile manually.

**If you have been instructed to review submission information**, you can follow the process below.

Visit the **Case Portal Submissions Tab**. The available views filter on whether each submission has become a contact profile. Note that any contact records that have been accepted as contact profiles (either manually or automatically) are automatically deactivated by the system.

To view all the contact submissions (accepted and non-accepted) for a particular case, you can filter the **All Case Portal Submissions** view by the **NC COVID Event ID of Case** column.

| Status   | First Name | Last Name | County (So...) | NC-COVID ... |
|----------|------------|-----------|----------------|--------------|
| Active   | Banana     | Smoothie  | Dare           | 101212121    |
| Inactive | Banana     | Peel      | Dare           | 101212121    |
| Inactive | Fig        | Leaf      | Dare           | 101212121    |

## REVIEWING CASE PORTAL SUBMISSION INFORMATION:

If you are a CCTO administrator or data manager or if you have been instructed by your local protocol to evaluate case portal submissions that have not been automatically accepted as contact records, **please see the next page.**

**You should only complete the manual approval process for these submissions if specifically instructed to do so.**





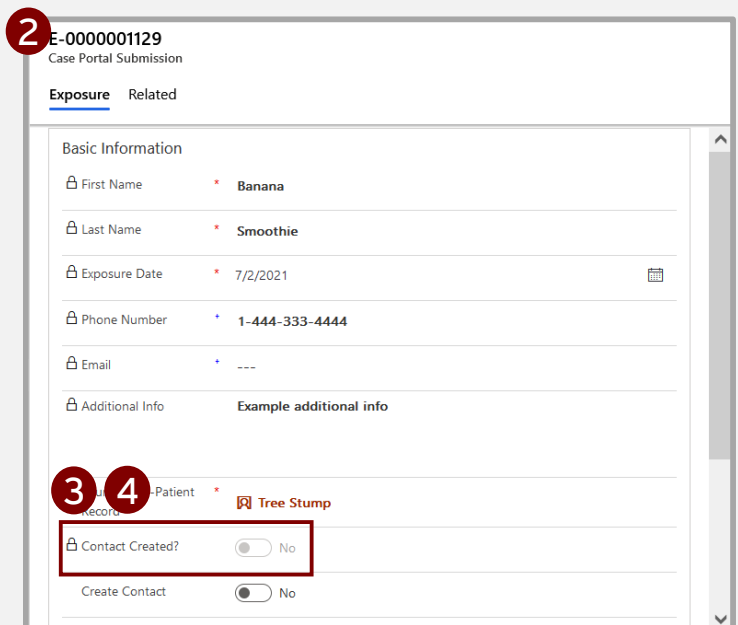
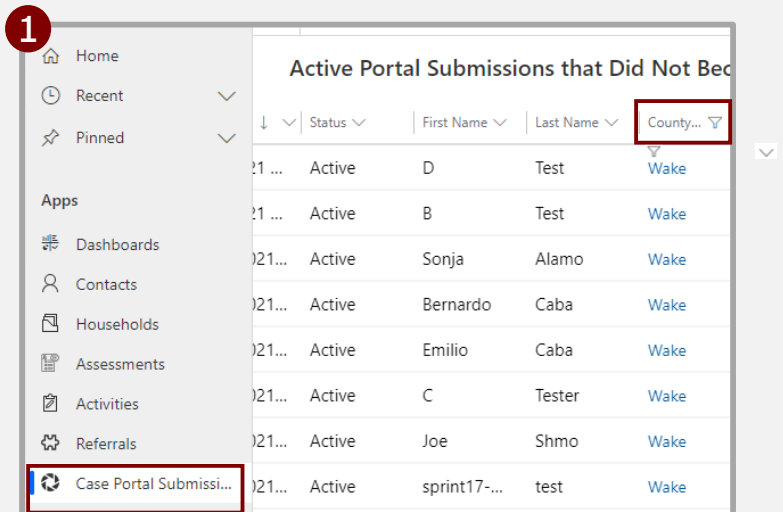
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## FOR ADVANCED CCTO USERS: Evaluating Case Portal Contact Submissions

**ONLY COMPLETE THIS PROCESS IF SPECIFICALLY INSTRUCTED TO DO SO.**

1. To see all active submissions that were not automatically turned to contacts, visit the **Case Portal Submissions Tab** and click on the **Active Portal Submissions That Did Not Become Contact Records** view, which serves as a to-do list of non-accepted submissions that must be reviewed. This view can be filtered by the county of the case patient in order to see only your county's submissions.
2. Clicking into a submission record within the **Case Portal Submissions Tab** will display all info and notes submitted by the case for a close contact.
3. Within a submission record, the locked **Contact Created?** field shows whether this submission has been converted into a contact profile. If it reads "Yes," then this submission is already a contact within the Contacts Tab, and the field is locked.
4. If it reads "No," then the system has not created a contact from this submission. **A CI should verify with the case whether this person is a true contact.** If a submission is reviewed and determined not to be a true contact, it should be deactivated, which will remove it from the **Active Portal Submissions That Did Not Become Contact Records** view.





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## FOR ADVANCED CCTO USERS: Evaluating Case Portal Contact Submissions

5. If a non-accepted submission is reviewed and determined to be a true contact who requires a contact profile, you can manually toggle the **Create Contact** field to "Yes" and save. This creates a new contact profile that will be owned by the owner team for the county of the case patient. *All of the fields on the contact submission record are locked, so any necessary changes to this contact's information must be made on the new profile.*
6. Once this contact is created, the system will automatically deactivate this submission record and lock the **Create Contact** field so that only one contact profile may be created per each submission.

The screenshot displays the 'Case Portal Submission' interface for submission E-0000001129. The 'Basic Information' section includes fields for First Name (Banana), Last Name (Smoothie), Exposure Date (7/2/2021), Phone Number (1-444-333-4444), Email, and Additional Info (Example additional info). The 'Source Case-Patient Record' is 'Tree Stump'. The 'Contact Created?' field is a toggle switch currently set to 'No'. The 'Create Contact' field is a toggle switch currently set to 'Yes'. A red box highlights the 'Create Contact' field, and a red arrow points to the 'Banana Smoothie' contact profile in the 'Record Information' section. The 'Record Information' section shows the contact was modified on 7/1/2021 at 1:37 PM by 'Arias Covid-Temp'. The 'Owner' is 'Dare'.

6. Once this contact is created, the system will automatically deactivate this submission record and lock the **Create Contact** field so that only one contact profile may be created per each submission.

The screenshot shows the 'Case Portal Submission' interface for submission E-0000001129. The 'Source Case-Patient Record' is 'Tree Stump'. The 'Contact Created?' field is a toggle switch currently set to 'Yes'. The 'Create Contact' field is a toggle switch currently set to 'Yes'. A red box highlights the 'Create Contact' field, and a red arrow points to the 'Banana Smoothie' contact profile in the 'Record Information' section. The 'Record Information' section shows the contact was modified on 7/1/2021 at 1:37 PM by 'Arias Covid-Temp'. The 'Owner' is 'Dare'.